COVID-19 Community Team Outreach Tool
Digital Exposure Notification for Contacts in CCTO

This job aid covers automatic digital exposure notifications for contacts who are entered into CCTO. *(Contacts who flow into CCTO from NC COVID will be sent a notification as soon as they enter CCTO with required fields correctly completed per the specifications below.)*

Automatic digital exposure notification is a helpful contact tracing enhancement that serves two purposes:

1. It **enhances existing workflows** by quickly helping contacts to learn of their exposure, to receive and share key info, and to begin accessing digital assessments. This expedites initial outreach but **will not prevent you from monitoring your contact normally or from contacting them by phone if needed.**
2. Depending on your local guidance, sending an exposure notification **may also take the place of an initial phone call** and/or of **ongoing monitoring**; this supports prioritizing contact tracer time for the contacts most likely to have and spread disease.

Sending a Digital Exposure Notification

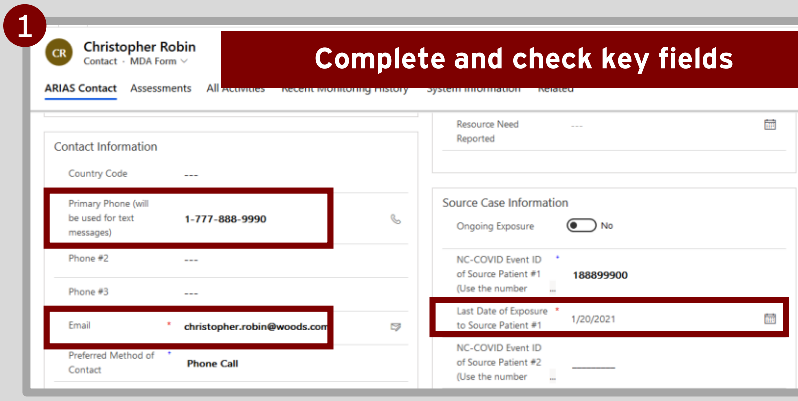
1. Contacts will receive a digital exposure notification automatically upon saving the profile if required fields are complete. Confirm **that you have completed and checked** these fields:
   - **First Name, Last Name, State,** and **County** (required CCTO fields)
   - **Last Date of Exposure to Source Patient #1**
   - **Email** AND/OR **Primary Phone** (notifications will be sent to any provided methods of contact)

The notification will include an end-of-quarantine date (based on the date listed in the "Monitoring End Date" field) and a test date (5 days since the most recent last date of exposure). ***If no "Monitoring End Date" is listed, the system will auto-populate it to be 14 days since the most recent last date of exposure. Please ensure that these dates are correct before sending a notification.***

1 **Complete and check key fields**

NOTE ABOUT MINORS:
While minors may receive a digital exposure notification, **contacts must be 18 years of age or older** to provide information through the digital portal. *Parents or guardians can submit digital monitoring information on behalf of minors.*

1 **Complete and check key fields**



*Hovering over **Last Date of Exposure to Source Patient #1** will present a message reminding you to use Case Interview Date if Last Date of Exposure is unknown.*

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2. When these required fields have been completed and saved, **a digital notification will be sent automatically to any method(s) of contact provided**. Note that the "**Send Notification?**" toggle will move to "Yes" **on its own** as soon as the required information is entered, and the notification will send as soon as you save. No other action is required on your part. If information is removed from the required fields, "**Send Notification?**" will move to "No." The toggle will move back to "Yes" and a new notification will be sent if the required fields are replaced with new information.
3. You can confirm that a text and/or email was created by visiting the contact's **All Activities Page** and confirming that an email and/or text is visible. Additionally, the notification will be displayed in the **Assessments Page** as an entry marked "Notification."
4. You can also review whether a **text message** notification created was confirmed to be delivered or undelivered to a mobile phone number by reviewing the fields for **"Text Notification Status"** and **"Status Date."** These fields will only update once; therefore, texts labeled as "Sent" or "Queued" were not yet delivered at the time they were checked by the system (in "Status Date") but still may have been subsequently delivered. *See next page for a full explanation of text status variables and their definitions.*

2 **Save your work**

3 **Confirm outreach/notification creation**

4 **Review text message status**

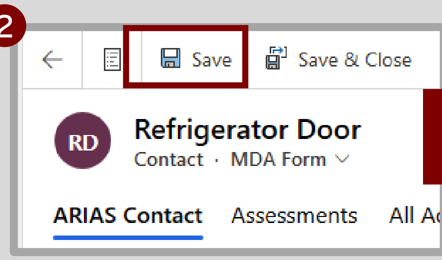
CRITERIA FOR AUTOMATICALLY SENDING OF A NOTIFICATION:

1. Send Notification? is set to "No"
2. Phone or **Email** and **Last Date of Exposure** are complete and there is a change to one of these fields *(including the change from blank to filled upon contact creation)*

Notifications send automatically between 8AM and 7PM only. Notifications sent outside this window will be sent first thing in the morning.

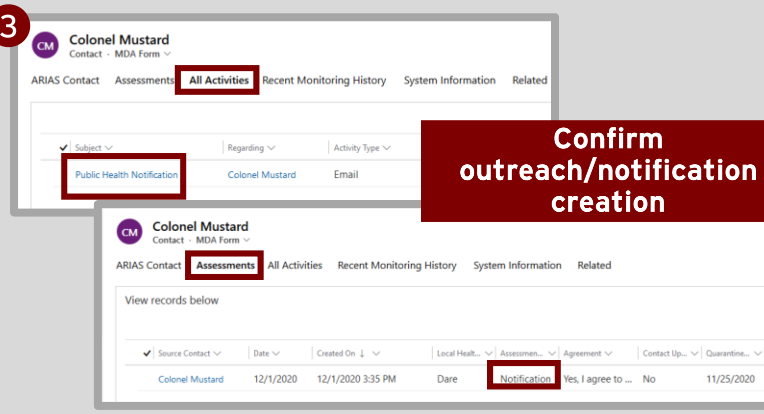
TIP: *Auto-save occurs after 30 seconds of inactivity. Be careful to review **Monitoring End Date** when updating required fields, as this determines the quarantine dates sent to the contact.*

2



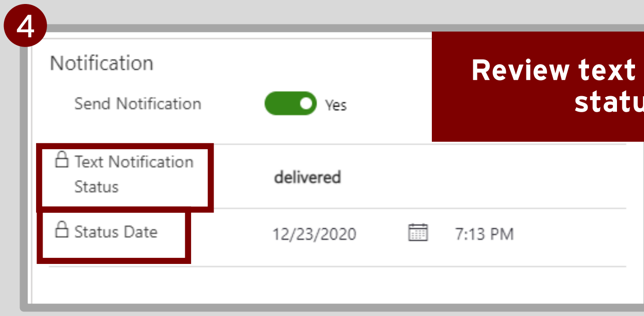
Save your work

3



Confirm outreach/notification creation

4



Review text message status

SEE NEXT PAGE FOR A FULL EXPLANATION OF TEXT STATUS VARIABLES AND THEIR DEFINITIONS.

Checking Text Notification Status in Contact Views

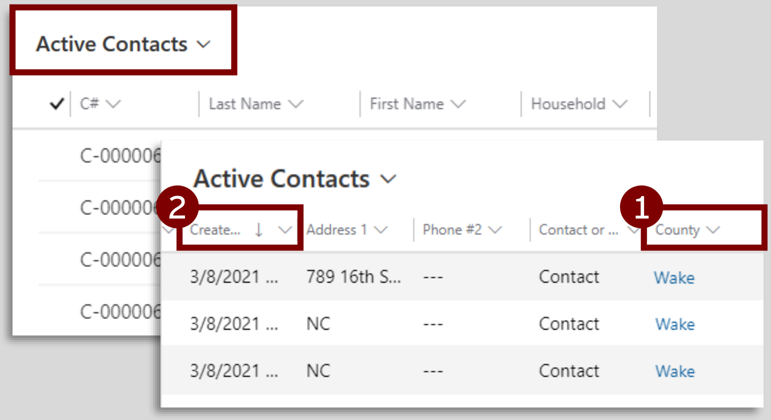
You can see the **Text Notification Status** field as a column in contact system views. To check most efficiently for which of your county's contacts did not receive a text notification:

1. Select the **Active Contacts** view and filter the **County** column by your county name.
2. The **Created On** column in this view is already **automatically** sorted by newest to oldest, so the most recent contacts will appear at the top of the list.
3. In this view, you can review the **Text Notification Status** column in order to find recently imported contacts for whom a text notification was **"Failed," "Undelivered," or Blank.** These contacts did not receive a text notification (though they may have been sent an email notification), and they may require further attention.

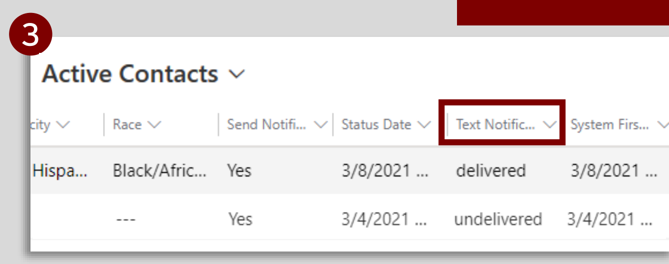
1 **Active Contacts View**

2 **Created On**

3 **Text Notification Status**



Active Contacts View



TEXT NOTIFICATION STATUS DEFINITIONS:

- **Delivered:** Text successfully delivered.
- **Sent:** Text sent but delivery unknown as of timestamp.***SEE NOTE**
- **Queued or Sending**: Text not yet sent as of timestamp.***SEE NOTE**
- **Undelivered or Failed**: Text unsuccessful, likely due to the number being a landline.
- **Blank:** No text created.

****NOTE: Text Notification Status** only updates one time; therefore, texts labeled as "Sent," "Sending," or "Queued" were not yet delivered as of the timestamp shown in **Status Date** but likely were delivered.*

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Understanding the Contact Perspective

1. Contacts will receive a text or email message **that informs them of their exposure and their personal quarantine dates (see *appendix*)**. It will also provide them with a **link to a digital portal landing page** with more details and testing info. This page asks them to **provide more information** by completing a CAPTCHA to proceed to the next page.
2. Contacts who complete the CAPTCHA will be asked to agree to participate in digital monitoring.
3. Contacts who opt in will then be asked **to provide the same personal, contact, and demographic info that they would provide on a normal initial outreach call.** *First Name, Last Name, DOB, State, County, and Email/Mobile Number (depending on Preferred Method of Contact) will be required.*
4. When contacts submit this form successfully, they will start to receive daily digital assessments via their preferred method of contact **until the end of their monitoring period as determined by the date in "Monitoring End Date."**

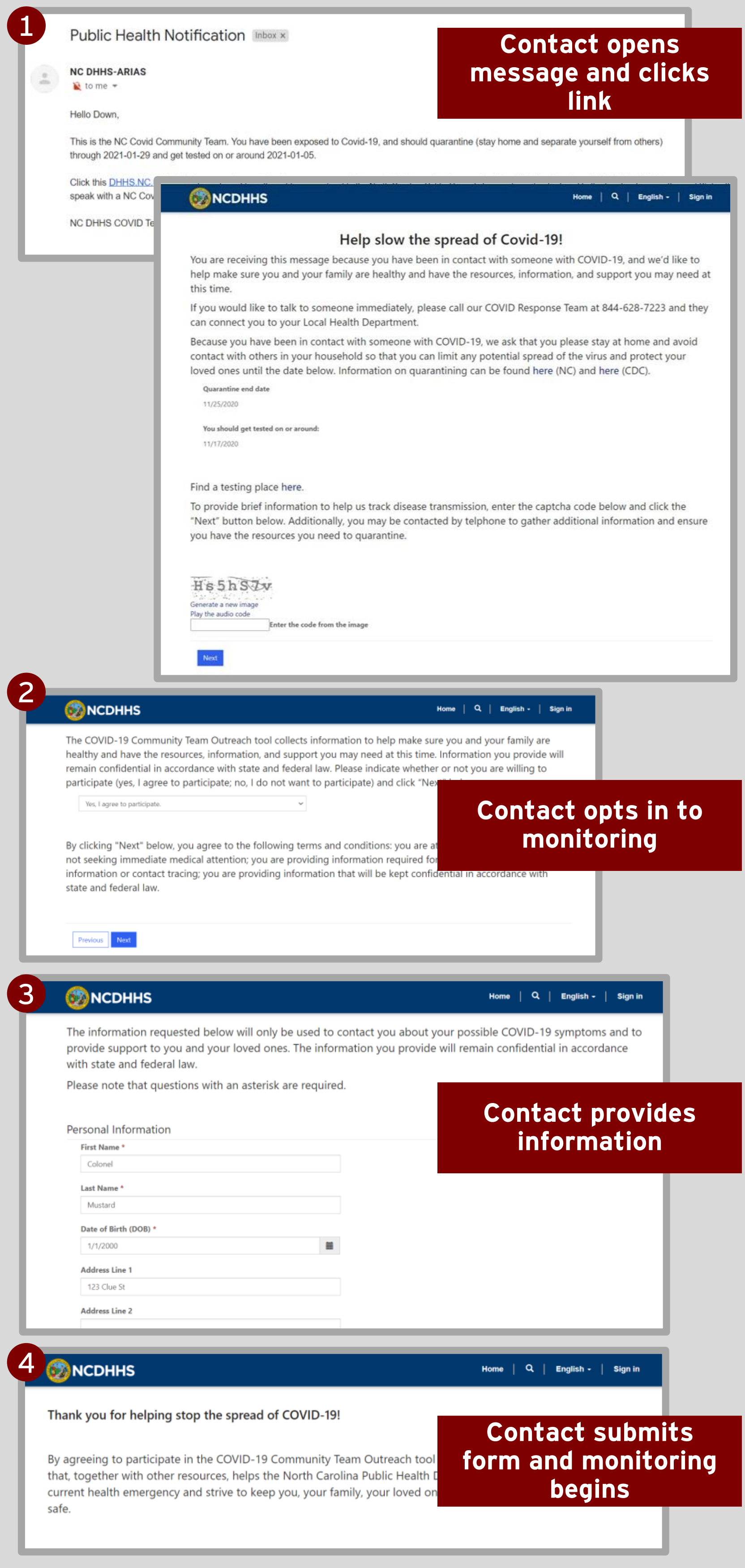
1 **Contact opens message and clicks link**

2 **Contact opts in to monitoring**

3 **Contact provides information**

4 **Contact submits form and monitoring begins**

Depending on your LHD's workflow, **contacts who complete these steps may or may not proceed to additional monitoring via phone.**



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Reviewing Information Gathered from an Exposure Notification

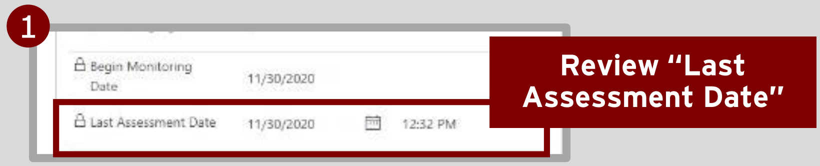
1. If your contact has provided information in the portal, you will see that **"Last Assessment Date"** has been updated on their profile.

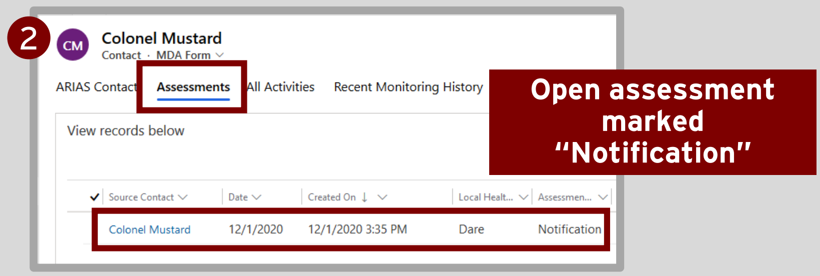
2. To see the information that your contact has provided in detail, **click into their Assessments Page and review the assessment marked "Notification."**

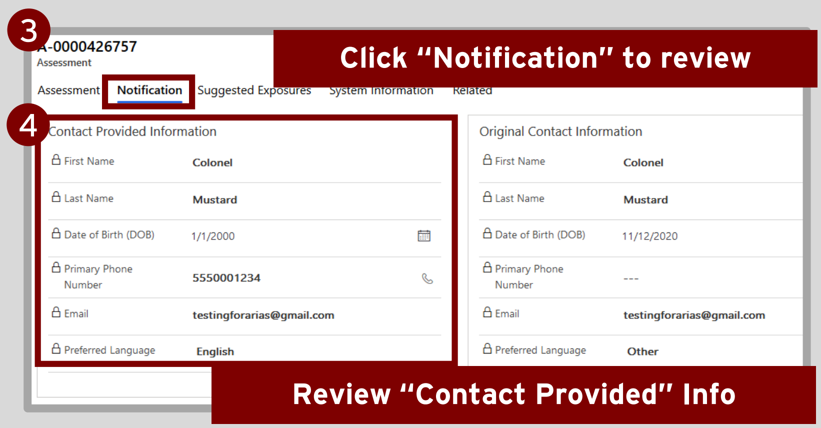
3. You can review information that your contact has provided against the information that was originally in their profile by **selecting the "Notification" page at the top of the assessment.**

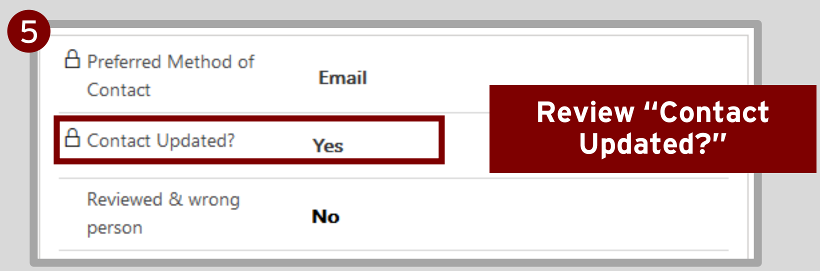
4. The boxes marked **"Contact Provided"** show your contact's responses, and the boxes marked **"Original Contact"** show what was originally in their profile.

5. **If your contact entered a last name that matched their last name in CCTO exactly, "Contact Updated?" will be set to "Yes,"** and all new or changed information that they have provided has been updated automatically on their profile. **If your contact's last name did not match exactly but you believe the information should still transfer to the contact record, please proceed to the next page.**









NOTIFIED CONTACTS WHO DO NOT RESPOND:
A **Final Monitoring Outcome** for **"Notification - No Response"** is available for contacts who were sent a notification but did **not** complete any assessments. Please defer to your local protocol and defer to the Closing Out A Contact [job aid](job aid) for support.

NOTE: DEMOGRAPHIC INFO WILL NOT TRANSFER
Due to inefficiencies with the system, **contact-provided demographic info will not automatically transfer onto profiles**; however, you can still review this information and update these fields manually.

1. **Review "Last Assessment Date"**
2. **Open assessment marked "Notification"**
3. **Click "Notification" to review**
4. **Review "Contact Provided" Info**
5. **Review "Contact Updated?"**

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Handling Incorrect Mismatches on Notifications

You should only complete this process if explicitly instructed to do so. Check with your supervisor on local protocol.

A **mismatch** occurs when **the last name that a contact submits in the digital portal does not match their original last name in CCTO** (either in spelling or in upper/lowercase), and this stops their profile from updating automatically. If you believe the submitted info should **still be paired** with the contact, however, you can correct this.

1. If the last name that a contact entered in the digital portal does not match their original last name in CCTO, **"Contact Updated?"** will be set to **"No"** because the Tool considers this a mismatch. This means info that they have provided **did not** automatically transfer onto their profile.

2. Contacts labeled as a mismatch can quickly be identified and reviewed by selecting the view for **"Notification – Contact not updated"** in the Assessments Tab.

3. **If you have determined that this is not a true mismatch and that the contact's profile *should* be updated with the info submitted, you can use a *flow* (automatic workflow) to do this in one step.** After selecting your contact(s) from the "Notification – contact not updated" view, click **"Flow"** at the top of the screen.

1 **"Contact Updated?" is set to "No"**

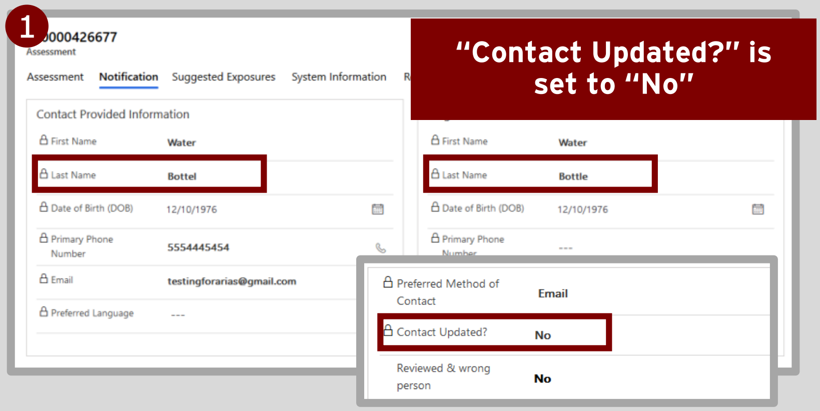
2 **"Notification – Contact not updated" view**

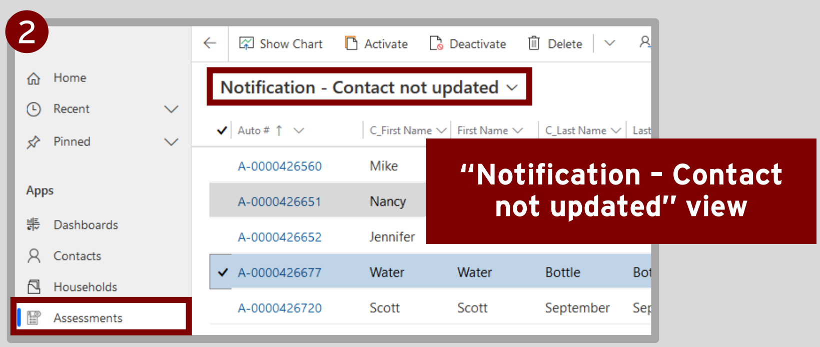
3 **Select contact(s) and click "Flow"**

Continued onto next page...

TRUE MISMATCHES:
Notifications received by the wrong person

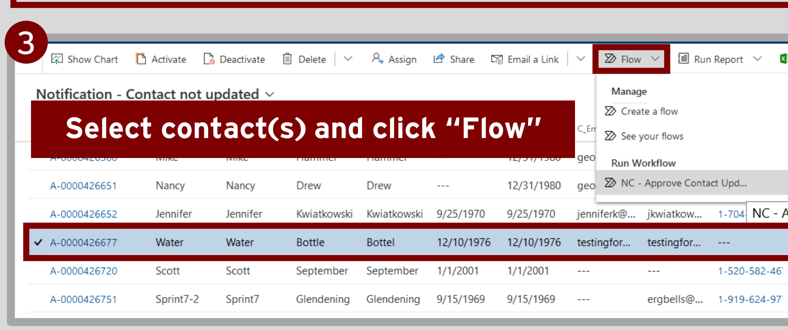
- If "Contact Updated?" reads "No" and you have determined that the notification was received by the wrong person, **consult with your supervisor.**
- A field has been provided for **"Reviewed & wrong person"** that you may use to document this, but you should always discuss documentation and next steps with your supervisor.





Note that the following are excluded from this view because these contacts should not be updated:

- If "Contact Updated?" reads "No" because the contact has opted in but not submitted any information.
- If "Contact Updated?" reads "No" **AND** "Reviewed & wrong person" *(see box above)* is set to **"Yes."**



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Handling Incorrect Mismatches on Notifications

4. Choose **"NC – Approve Contact Update."**

5. The first time you run this flow, you will receive a dialogue that asks you to connect to the Common Data Service. You can approve any prompts you may receive, and you will see a green check mark when you have been connected.

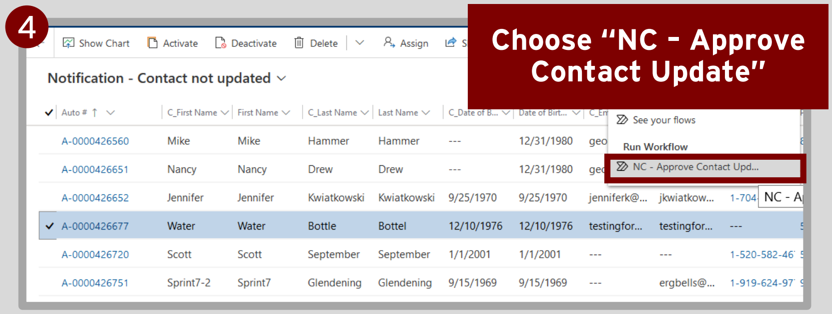
6. Click **"Run Flow,"** and you will receive a confirmation message. All submitted contact info will be transferred automatically, and you can click "Done."

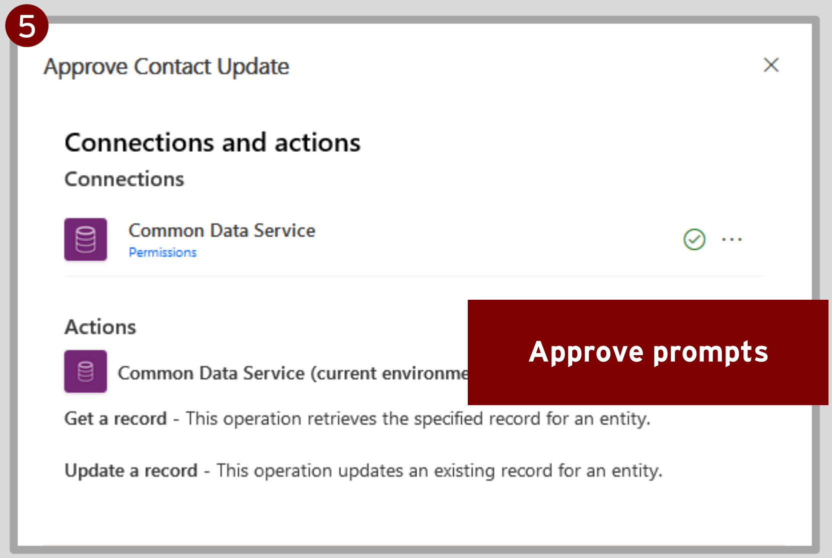
4 **Choose "NC – Approve Contact Update"**

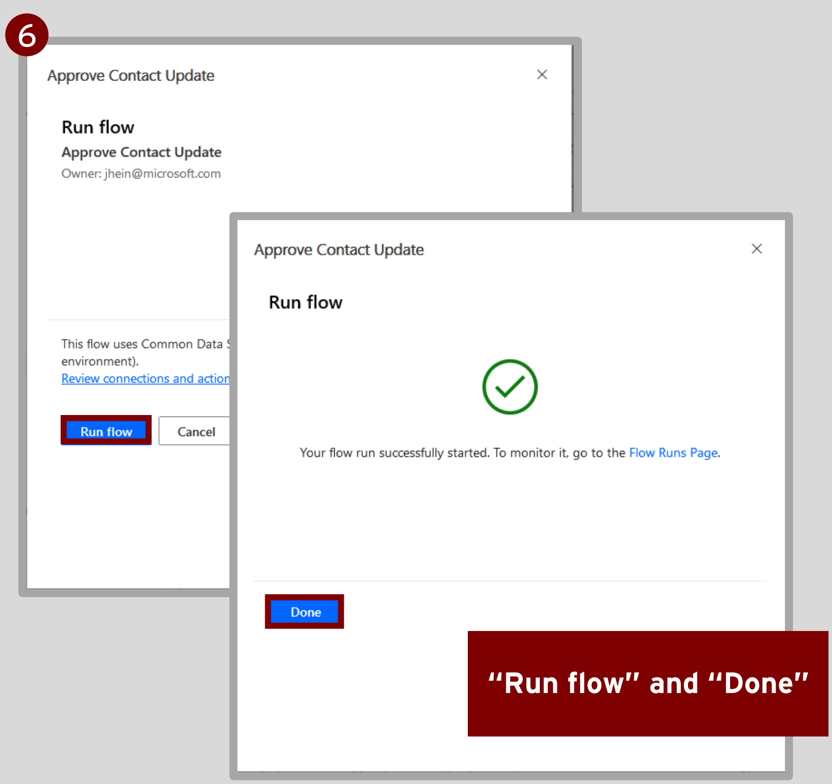
5 **Approve prompts**

6 **"Run Flow" and "Done"**

CORRECT MULTIPLE MISMATCHES:
In addition to running this flow for one contact, you can also select multiple contacts in any assessment view and run the flow for several contacts at one time.







APPENDIX: Full text of email and text message notification

Links below are not functional; actual links that contacts will receive to direct them to their unique landing pages (see page 3) will appear in the *formats* shown below.

FULL TEXT OF EMAIL:

Hello **[CONTACT NAME HERE],**

This is the NC Covid Community Team. You have been exposed to Covid-19, and should quarantine (stay home and separate yourself from others) through **[DATE HERE PER "MONITORING END DATE" FIELD]** and get tested on or around **[DATE HERE PER 5 DAYS SINCE MOST RECENT LAST DATE OF EXPOSURE].**

Click this DHHS.NC.GOV link for quarantine and testing resources and to provide information for your local health department; call 844-628-7223 to speak with a NC Covid Community team member directly.

NC DHHS COVID Team

FULL TEXT OF TEXT MESSAGE:

[CONTACT NAME HERE], You were exposed to COVID-19 & should quarantine through **[DATE HERE PER "MONITORING END DATE" FIELD].** Get tested on **[DATE HERE PER 5 DAYS SINCE MOST RECENT LAST DATE OF EXPOSURE].** Info: https://ncdhhs-outreach-uat.powerappsportals.us/en-US/notification/?id=f9fe75d5-d14e-eb11-a811-001dd8309ba3 or 844-628-7223. –NC DHHS COVID Team